

# Data Integration Project Sustainability Tip Sheet

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Planning for the sustainability of data system integration should be a fundamental part of the initial project plan. Taking a long-term view rather than a project-to-project approach improves the data culture and chances of success.

The intent of this tip sheet is to identify key components, strategic timing, and planning considerations for sustaining data integration work.

This tip sheet describes sustainability planning by the following themes, Documentation, Communication and Scheduling, Leadership Engagement, and Fiscal. The themes are intended to help users step back and think broadly and strategically rather than in a series of sequential steps. In order to help apply that thinking and manage the project and planning, CIID Data Integration Toolkit steps are listed throughout for reference. The Toolkit can also be used as a progress check to ensure that attention is paid to best practices for project sustainability.

## Documentation

Project documentation provides a stable structure for planning and sustainability as it can prevent loss of momentum and limit scope creep.

### During the project:

- Thoroughly document each step of the process, including justification for decisions made and information about the data system structure and databases. Planning and documentation discussions should include staff from both the IT department as well as data stewards from program offices. (All Toolkit Steps)
- Train appropriate staff on use of CEDS. (Toolkit Steps 3 and 4)
- Assign staff to maintain data dictionary and CEDS mapping to keep them current. (Toolkit Step 7)
- Review documentation and assign responsibility to keep documentation up to date. This will help support accurate and timely processes and documentation. (Toolkit Step 7)

### After the project is complete:

- Monitor and document changes to data definitions to identify new data elements to integrate. (Toolkit Step 7)
- Complete the **CIID ETL Checklist** and review with IT and program staff to ensure wide understanding of the contents and processes of the ETL. (Toolkit Step 5)

## Communication and Scheduling

Keep stakeholders engaged and updated on the progress and potential of the integrated data. Plan ahead for deadlines and requirement changes to prevent costly overtime and reduce likelihood for errors.

### During the project:

- Create and execute a communication plan for external and internal stakeholders. The communication plan can help keep stakeholders informed of the progress of the project, along with garnering potential support for sustaining the work. (Toolkit Step 2)

### After the project is complete:

- Gather evidence to demonstrate that the outcomes of the integrated system were worth the initial investments and justify sustaining the integrated system. (Toolkit Step 7)
- Provide training(s) on how to access the integrated data and reports to ensure widespread system use. (Toolkit Step 7)
- Review the calendar containing all processes and key dates for the newly integrated data system and assign responsibility to keep the calendar up to date. (Toolkit Step 7)
- Consider sending reminders to program office data stewards throughout the year as collections come up. (Toolkit Step 7)

## Leadership Engagement

Agency leadership is a key stakeholder group that requires additional detail and planning to ensure they are engaged. Ensure agency leadership are kept informed of the progress of the integration project, are reminded of the added value the integrated data brings the agency and the associated support needed for long-term use.

### During the project:

- Keep SEA leadership apprised of the progress as the data integration project progresses. This will keep the project in front of them and they will be better aware of the project's value and the need to support it. (All Toolkit Steps)
- Look for opportunities to present use case(s) to demonstrate capabilities and value for the project, along with a tangible display of why this project is important and the need for support. (Toolkit Step 1 and 7)

### After the project is complete:

- Collaborate with SEA leaders to determine next steps (Toolkit Step 7):
  - How might the integration expand to other data types?
  - What additional ways can the data be used once it is integrated?
- Determine timing to raise support and maintenance issues with SEA leadership (Toolkit Step 7):
  - Funding needs
  - HR needs
  - Expansion needs

## Fiscal

Planning for long-term financial and personnel resources is key for project success and should be incorporated into every step of the process. Financial and resource planning should be treated as priorities included in project documentation and strategic planning.

### During the project:

- Confirm fiscal and personnel support for the integration project (Toolkit Steps 1, 2, and 7):
- Determine agency resource needs and secure agency resources, including short- and long-term to sustain data integration work (Toolkit Steps 1 and 7).

### After the project is complete:

- Identify the resource requirements (funding, HR, etc.) not just for the duration of the project, but also for the long-term support of the project once it is implemented. (Toolkit Step 7)
- If vendors and contractors are involved in the implementation, determine long-term engagement. If they are only going to be part of the implementation, but not support and maintenance, identify SEA staff who can partner with the vendors and contractors, and learn the process so they can support the integration work after the contractors are gone. (Toolkit Steps 2-7)
- Ensure that proper funding is obtained to support the ongoing needs of the integrated system. (Toolkit Steps 1 and 7)

For further information on sustaining your data integration project please contact CIID at [CIIDTA@aemcorp.com](mailto:CIIDTA@aemcorp.com).



Contact Us: By email at [CIIDTA@aemcorp.com](mailto:CIIDTA@aemcorp.com).  
Visit the CIID website for more information at [CIIDTA.org](http://CIIDTA.org).

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